

# **Elevator and Escalator Market Report by Type (Elevators, Escalators, Moving Walkways), Service (New Installation, Maintenance and Repair, Modernization), End Use (Residential, Commercial), and Region 2024-2032**

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## **Abstracts**

The global elevator and escalator market size reached US\$ 154.0 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 239.7 Billion by 2032, exhibiting a growth rate (CAGR) of 4.89% during 2024-2032. The rise in construction activities, growing investment in infrastructure development, particularly in developing countries, the increasing emphasis on energy-efficiency and sustainability, the adaptation of smart technology into elevators and escalators, and the growing geriatric population represent some of the factors that are propelling the market.

Elevator and escalator encompass a range of products and services centered on vertical and horizontal transportation in buildings and other large structures. Elevators are electric lifts that move people and goods between floors, while escalators are moving staircases used primarily in commercial settings. Both are engineered with intricate electrical and mechanical systems to ensure safety, efficiency, and convenience. Elevators generally operate on counterweight systems and electric motors, while escalators use a constant-speed motor to move a circulating chain of steps. These systems are integral to modern architecture and are vital in ensuring accessibility and functionality in residential, commercial, and industrial spaces.

The global market is primarily driven by accelerating urbanization rates and the proliferation of high-rise buildings in cities worldwide. This can be attributed to the growing number of shopping malls, airports, and railway stations where high footfall necessitates robust vertical and horizontal transport systems. Besides this, growing

investment in infrastructure development, particularly in developing countries is offering new opportunities in the market. Additionally, innovative design concepts that integrate elevators and escalators into a building's aesthetic are attracting consumer interest. Furthermore, the adaptation of smart technology into elevators and escalators, such as touchless control panels, facial recognition, and real-time diagnostics, is also contributing significantly to market momentum. Apart from this, safety regulations and compliance requirements are increasing, mandating upgrades and replacements of older systems, which is creating a positive market outlook. Some of the other factors contributing to the market include inflating disposable income levels, intensive product development activities, and escalating need for accessibility in public and private buildings.

#### Elevator and Escalator Market Trends/Drivers:

##### Rise in construction activities

The crucial role of infrastructure development in propelling the elevator and escalator market cannot be overstated. As cities continue to grow vertically, the essential need for efficient vertical transport systems becomes increasingly pronounced. This is particularly evident in fast-developing economies where construction activities are at a peak, driven by both the government and private sectors. Infrastructure projects like airports, railway stations, shopping malls, and even educational institutions require state-of-the-art vertical and horizontal transportation systems to accommodate the heavy footfall and ensure the safety of people. Additionally, new residential complexes aim to provide the best in comfort and convenience, which includes high-speed, secure, and efficient elevators. These extensive construction projects not only reflect the growth of urban spaces but also signify the maturing expectations of the consumers, who now consider such transport systems to be not mere luxuries but essential facets of modern living.

##### Increasing emphasis on energy-efficiency and sustainability

The rising emphasis on creating energy-efficient and sustainable elevators and escalators is increasingly becoming a major driving force in market growth. Companies are now incorporating smart technologies like regenerative drives that return energy back into the building grid, LED lighting that consumes less electricity, and standby modes that significantly reduce power usage when the systems are not in operation. These innovations not only offer cost-effective solutions by decreasing operational expenses but also appeal to a consumer base that is progressively environmentally conscious. The transition toward green technology aligns with international sustainability

targets, thus giving an added incentive for both manufacturers and consumers to move in this direction. As a result, the focus on sustainability is expected to remain a dominant factor steering the market's trajectory.

The growing geriatric population requiring higher accessibility

The global demographic is experiencing a shift with the steady increase in the geriatric population. In this context, the role of elevators and escalators in promoting accessibility in public and private spaces becomes even more pivotal. An older population presents unique challenges, such as reduced mobility and a greater need for safety features. This has led to a specific market demand for elevators and escalators equipped with features like user-friendly interfaces, emergency call buttons, and lower speeds for easy boarding and disembarking. Many countries with a significant aged population have already started implementing these as standard features. This focus on inclusivity is crucial not just from a social perspective but also offers a viable market opportunity for companies to innovate and customize their product offerings. The geriatric population, therefore, not only adds to the immediate demand for accessible systems but also is a significant factor driving technological innovation in this sector.

Elevator and Escalator Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global elevator and escalator market report, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on type, service and end use.

Breakup by Type:

Elevators

Escalators

Moving Walkways

Elevators represent the largest market segment

The report has provided a detailed breakup and analysis of the market based on the type. This includes elevators, escalators, and moving walkways. According to the report, elevators represented the largest segment.

Elevators dominate as a major segment, primarily due to continual technological advancements in speed, capacity, and energy efficiency. The introduction of features

such as touchless controls and air purification systems in the wake of health crises has also positively impacted demand. Elevators are increasingly being seen as a value addition to commercial and high-end residential spaces, making them indispensable.

On the other hand, escalators and moving walkways, form minor but relevant segments of the market that are also expanding. These are primarily used in public spaces like airports, shopping malls, and transit systems. With a focus on reducing the human effort required for mobility, especially over short distances, these systems play a supporting role to elevators. Their importance becomes particularly significant during peak hours, yet the demand is comparatively less than that for elevators.

#### Breakup by Service:

New Installation

Maintenance and Repair

Modernization

New installation represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the service. This includes new installation, maintenance and repair, and modernization. According to the report, new installation represented the largest segment.

New installations represent another major segment that is influenced by the expanding urban centers, a surge in skyscraper constructions, and an increased emphasis on making public spaces more accessible. Advances in technology, like gearless and machine-room-less elevators, have made installations more appealing and efficient. Increasing investments in public infrastructure and growing demands for energy-efficient solutions add to the factors driving new installations. Stringent safety regulations are also prompting the replacement of older systems with new installations.

On the other hand, maintenance and repair, combined with modernization, are minor segments, that are still growing. While new installations are essential, the maintenance and modernization of existing systems are mandated by safety regulations. The increasing age of existing installations necessitates upgrades for improved functionality and compliance with modern safety standards. However, the growth here is not as robust as in the new installations and commercial sectors.

#### Breakup by End Use:

Residential  
Commercial  
Offices  
Hospitality  
Mixed Block  
Others

Commercial accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the end use. This includes residential and commercial (offices, hospitality, mixed block, and others). According to the report, commercial represented the largest segment.

The commercial segment is a major driving force owing to rapid infrastructure development, particularly in office buildings, shopping malls, and airports. The integration of smart technologies, such as Internet of Things (IoT) and Artificial Intelligence (AI), has further propelled demand, optimizing energy usage and providing enhanced user experiences. Regulatory standards that require buildings to be more accessible are also contributing factors. The rise in the number of high-rise buildings requiring fast and efficient elevators and escalators to manage people flow efficiently completes the quartet of key drivers in this segment.

On the other hand, the residential segment experiences minor growth driven primarily by urbanization and increased multi-story residential projects. The convenience factor of having elevators in residential settings has also contributed to modest increases. The need for elderly and physically-challenged individuals to access different floors easily has facilitated this segment's growth.

Breakup by Region:

North America  
United States  
Canada  
Asia Pacific  
China  
Japan  
India  
South Korea

Australia  
Indonesia  
Others  
Europe  
Germany  
France  
United Kingdom  
Italy  
Spain  
Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest elevator and escalator market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

The Asia Pacific region has multiple driving factors contributing to the growth of the elevator and escalator market. Urbanization is rampant, particularly in countries like China and India, where the expansion of cities necessitates multi-level buildings for both residential and commercial use. The Asia Pacific also leads in technological innovation, often being the first market to adopt new systems. Government initiatives and public-private partnerships in infrastructure development have further fueled growth.

The presence of several manufacturing powerhouse countries, such as China and Japan, significantly contributes to both the domestic and global supply chain. Safety regulations are increasingly strict, fostering a healthy market environment. Moreover, the increased standard of living and growing middle-class population in the region have created a demand for more advanced and comfortable elevator and escalator systems.

Furthermore, with sustainability being a global concern, the region is seeing a rise in demand for energy-efficient solutions, thereby further driving the market.

#### Competitive Landscape:

The key market players are continuously focusing on innovations to improve energy efficiency and safety measures. They are integrating smart technologies, such as IoT and artificial intelligence, to make elevators and escalators more adaptive and responsive to user needs. R&D initiatives are actively aimed at incorporating eco-friendly materials and energy-saving features. The major companies are entering strategic collaborations with real estate developers, thus securing long-term contracts for installation and maintenance services. These enterprises are also establishing manufacturing facilities in emerging economies to capitalize on the growing infrastructure needs in those regions. Additionally, companies are developing enhanced digital marketing strategies, including virtual demonstrations and online customer engagement platforms are being employed to gain a wider customer base. To remain competitive, they are also focusing on modular designs that allow easier upgrades in the future.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Canny Elevator Co. Ltd.

Electra Elevators

Fujitec Co. Ltd.

Gulf Elevators & Escalators Co. Ltd.

Hitachi Ltd.

Hyundai Elevator Co. Ltd.

Johnson Lifts Private Limited

Kleemann Group

KONE Corporation

Mitsubishi Electric Corporation

Otis Elevator Company (I). Ltd (Otis Worldwide Corporation)

Schindler Holding Ltd.

Sigma Elevator Company

Toshiba Elevator and Building Systems Corporation (Toshiba Corporation)

#### Recent Developments:

In June 2023, Canny Elevator Co. Ltd. was ranked among the "China's 500 most valuable Brands" list in the 20th "World Brand Congress" hosted by the World Brand



Lab, held in Beijing. With a brand value of 13.689 billion yuan, Canny Elevator Co. Ltd. is the only Chinese elevator brand listed with a brand value of more than 10 billion yuan. In August 2023, Fujitec Singapore Corpn. Ltd, a group subsidiary of Fujitec Co. Ltd., completed the modernization of 19 elevators in One Raffles Place (formerly OUB Center), Singapore. The new elevators equipped with the latest functions, offer increased speed and new systems to shorten riding time, offering greater comfort and more stability.

In June 2023, Hitachi Elevator Engineering Company, a subsidiary of Hitachi Ltd., secured its largest order in Hong Kong, consisting of 160 elevators, escalators, and moving sidewalks for the Hong Kong West Kowloon Station complex from Sun Hung Kai Properties Limited. Manufactured by Hitachi Elevator (China) Co., Ltd., the order includes 115 elevators—22 of which are high-speed—and is scheduled for delivery by December 2024.

### Key Questions Answered in This Report

1. How big is the global elevator and escalator market?
2. What is the expected growth rate of the global elevator and escalator market during 2024-2032?
3. What are the key factors driving the global elevator and escalator market?
4. What has been the impact of COVID-19 on the global elevator and escalator market?
5. What is the breakup of the global elevator and escalator market based on the type?
6. What is the breakup of the global elevator and escalator market based on the service?
7. What is the breakup of the global elevator and escalator market based on the end use?
8. What are the key regions in the global elevator and escalator market?
9. Who are the key players/companies in the global elevator and escalator market?



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